

## How to Manage Reporting Obligations on ROS - Agents

In order to file for DAC2-CRS, DAC4-CbC, FATCA, DAC6, Suspicious Transaction Reports (STR) and Share Schemes Reporting (SSR) the client needs to be registered.

### To register a client for a Reporting Obligation (where the client already has an assigned tax or reporting obligation registration number)

- Login to ROS and scroll down to “Manage Client Registrations”.
- Select a tax or reporting obligation that the client is already registered for, enter the registration number and the client name and select “Manage Reporting Obligations”.
- Click on “Manage”.

Manage Tax Registrations

**Manage Client Registrations**  
Please use this option to update, add or cancel Agent/Client links and tax registrations if your client had/had an existing tax number, incl. PAYE.

Tax Registrations  Reporting Obligations

VAT   
ros

[Manage →](#)

**Register New Revenue Customer**  
You can now register new individuals, companies, partnerships and trusts with Revenue.

[Register New Revenue Customer](#)

You can also register new reporting entities.

[Register New Reporting Entity](#)

You will be brought to the e-Registration page.

- Click on “Select Action” beside the relevant registration option. (In this example we are registering for DAC6).

eRegistration

Manage Your Reporting Obligations and Agent Links  
**Notes:**  
You may add multiple requests to 'Your Requests' area.  
You will be brought back to this screen after completing each request form.  
Items in the 'Your Requests' area will not be processed until the 'Submit' process is completed.

**Registration Options**

**Share Schemes Reporting - SSR**  
You are not linked to this reporting obligation [Select Action >](#)

**DAC6 - DAC6**  
You are not linked to this reporting obligation [Select Action >](#)

**STR - STR**  
You are not linked to this reporting obligation [Select Action >](#)

**FATCA - FATCA**  
You are not linked to this reporting obligation [Select Action >](#)

**DAC2-CRS - DAC2-CRS**  
You are not linked to this reporting obligation [Select Action >](#)

**DAC4-CbC - DAC4-CbC**  
You are not linked to this reporting obligation [Select Action >](#)

You will be presented with 3 options.

- Select the appropriate action by clicking on the link, check with your client as necessary.

Manage Your Reporting Obligations and Agent Links  
**Notes:**  
You may add multiple requests to 'Your Requests' area.  
You will be brought back to this screen after completing each request form.  
Items in the 'Your Requests' area will not be processed until the 'Submit' process is completed.

**Registration Options**

**Share Schemes Reporting - sSR**  
You are not linked to this reporting obligation [Select Action >](#)

**DAC6 - DAC6**  
You are not linked to this reporting obligation [Select Action >](#)

[Add and link to a new registration](#)  
[Link and cease an existing registration](#)  
[Link only to an existing registration](#)

**STR - STR**  
You are not linked to this reporting obligation [Select Action >](#)

**FATCA - FATCA**  
You are not linked to this reporting obligation [Select Action >](#)

**DAC2-CRS - DAC2-CRS**  
You are not linked to this reporting obligation [Select Action >](#)

**DAC4-CbC - DAC4-CbC**  
You are not linked to this reporting obligation [Select Action >](#)

- On the Request Confirmation page click on “**Confirm**” at the bottom of the screen.
- Enter the registration date and click “**Add To Your Requests**”. The registration will go to “Your Requests”.
- Click on the “**Submit**” button under “Your Requests” in the panel on the right.

**eRegistration**

Manage Your Reporting Obligations and Agent Links  
**Notes:**  
You may add multiple requests to 'Your Requests' area.  
You will be brought back to this screen after completing each request form.  
Items in the 'Your Requests' area will not be processed until the 'Submit' process is completed.

**Registration Options**

**Share Schemes Reporting - sSR**  
You are not linked to this reporting obligation [Select Action >](#)

**DAC6 - DAC6**  
Status: In Requests

**STR - STR**  
You are not linked to this reporting obligation [Select Action >](#)

**FATCA - FATCA**  
You are not linked to this reporting obligation [Select Action >](#)

**DAC2-CRS - DAC2-CRS**  
You are not linked to this reporting obligation [Select Action >](#)

**DAC4-CbC - DAC4-CbC**  
You are not linked to this reporting obligation [Select Action >](#)

**Your Requests (1)**

Register  
DAC6  
[Edit](#) [Cancel](#)

You need to submit this request in order for this transaction to be processed. [Submit >](#)

On the eRegistration Summary page you may generate the Client Consent letter (similar to Agent Link Notification letters). The letter should be completed by the agent and signed by the client. This letter should then scanned or photographed and the electronic version (.pdf, .tif or .tiff are acceptable) should be uploaded on the next page. These files need to be under 5 Mb in size to upload successfully to ROS.

Once you have the Client Consent letter saved in a digital format click on “**Next**”.

**eRegistration**

Summary

DAC6 Reporting Obligation (New)

Registration Date 22/04/2020

**i** The option to generate a Consent letter that can be signed by your client and a copy retained on your records is displayed below. Click on the "Generate Client Consent Letter" button to generate a Consent Letter in respect of the registrations input for your client. The letter will be generated in .PDF format. To view this Letter, you will need at least Adobe Reader version 8.0 or a similar .PDF Reader. The latest version of Adobe Reader is available for free from the following link: [Download Adobe Reader](#).

**Generate Client Consent Letter** **Back** **Next**

- Click on **"Browse"** or **"Choose File"** and upload your file. Tick the box to indicate which reporting obligation the Agent Link is in relation to (in this example DAC6). Click **"Next"**.

**eRegistration**

Agent Link Attachment

In order to safeguard the integrity and security of Revenue client records, all online requests made by agents which may result in a new agent-client link being created must be accompanied by an uploaded signed Agent Link Notification letter.

Further information and a sample letter are available [here](#).

Electronic copies of signed letters must be in the .pdf, .tif or .tiff format and be less than 5 megabytes in size.

File\*

**Browse...**

Please indicate which reporting obligations the attachment is relevant to by checking the boxes.

DAC6

Please upload a copy of the signed Agent Link Notification letter by clicking the 'Next' button.

**Back** **Next**

- Click on **"Sign & Submit"** on the bottom of the page.
- On the next page enter your password and click on **"Sign & Submit"**.

**eRegistration**

Summary

DAC6 Reporting Obligation (New)

Registration Date 08/04/2020

**Back** **Sign and Submit**

You will receive a ROS Acknowledgement with an eRegistration summary which indicates if the registration/linking was successful.

- Once completed, it may take up to 3 working days for the registration to reflect in ROS.
- You will receive a registration confirmation to your Clients' ROS Inbox .
- Once the first reporting obligation is added, the Reporting Obligation radio button will appear under **“Complete a Form Online”** on the **“Client Services”** page.

The screenshot shows a web interface with two main sections. The top section, 'Employer Services', contains four columns of links: 'Revenue Payroll Notifications (RPNs)' with a 'Request RPNs' link; 'Payroll' with 'Submit payroll' and 'View payroll' links; 'Returns' with a 'Statement of Account' link; and 'Additional Services' with 'PPS Number Checker' and 'PAYE Modernisation Information' links. The bottom section, 'File a Return', is expanded to show 'Complete a Form Online' options. It includes a heading 'Complete a Form Online', a sub-heading 'Select a return you would like to complete now. You will be given the option of filing the return with or without a payment.', and two radio buttons: 'Tax Registrations' (selected) and 'Reporting Obligations' (highlighted with a red box). Below the radio buttons is a dropdown menu labeled 'Select a tax type...'. At the bottom of the 'File a Return' section is a link 'Upload Form(s) Completed Offline'.

## Registering New Reporting Entities


You can also register new reporting entities by clicking on **“Register New Reporting Entities”** on the **“Agent Services”** screen. To avoid duplicate registrations, please ensure to check that the entity does not already have a tax or reporting number with Revenue.

The screenshot shows a web interface for 'Manage Tax Registrations'. It is divided into two main panels. The left panel, 'Manage Client Registrations', includes a sub-heading 'Manage Client Registrations', a paragraph 'Please use this option to update, add or cancel Agent/Client links and tax registrations if your client had/had an existing tax number, incl. PAYE.', and two radio buttons: 'Tax Registrations' (selected) and 'Reporting Obligations'. Below the radio buttons are two dropdown menus labeled 'Select a tax type...' and 'Enter registration no.', and two text input fields labeled 'Enter name' and 'Select tax type...'. A blue button labeled 'Manage' with a right-pointing arrow is at the bottom of this panel. The right panel, 'Register New Revenue Customer', includes a sub-heading 'Register New Revenue Customer', a paragraph 'You can now register new individuals, companies, partnerships and trusts with Revenue.', and a blue button labeled 'Register New Revenue Customer' with a person icon. Below this is another paragraph 'You can also register new reporting entities.' and a blue button labeled 'Register New Reporting Entity' with a person icon, which is highlighted with a red box.

Select the additional reporting obligations as required and click **“Next”**.

**eRegistration**

### Reporting Entity Registration (1 of 2)

 You will be required to upload an 'Agent Link Notification' letter authorising this request before completion.

Electronic copies of signed letters must be in the tif, tiff or pdf format and be **less than 5 megabytes in size**.

Please note,

- If the customer should be registered for additional reporting obligation, please select the additional reporting obligation. You will be identified as **the linked agent for these additional registrations** selected:

- DAC2-CRS Reporting Obligation
- DAC4-CbC Reporting Obligation
- FATCA Reporting Obligation
- DAC6 Reporting Obligation
- STR Reporting Obligation

**Next** >

Enter the relevant details and click “**Next**”. (In this example we have clicked DAC2-CRS Reporting Obligation).

**eRegistration**

### Reporting Entity Registration (2 of 2) - Reporting Entity Details

\* Denotes a required field  
Please supply at least one of email address, phone number or mobile number.

Reporting Entity

Reporting Entity name *	<input type="text"/>
Address Line 1 *	<input type="text"/>
Address Line 2 *	<input type="text"/>
Address Line 3	<input type="text"/>
Address Line 4	<input type="text"/>
Eircode	<input type="text"/>
Email Address	<input type="text"/>
Phone (STD Code and Number)	<input type="text"/> <input type="text"/>
Mobile Contact Name	<input type="text"/>
Mobile Number	<input type="text"/>
Responsible Officer *	<input type="text"/>

**Next** >

Enter the registration date and click on “**Next**”.

**eRegistration**

DAC2-CRS Registration

\* Denotes a required field

Registration Date (DD/MM/YYYY) \*

X Cancel ← Back **Next** →

On the eRegistration Summary page you will be requested to generate the Client Consent letter (similar to Agent Link Notification letters). The letter should be completed by the agent and signed by the client. This letter should then scanned or photographed and the electronic version (.pdf, .tif or .tiff are acceptable) should be uploaded on the next page. These files need to be under 5 Mb in size to upload successfully to ROS. Once you have the Client Consent letter saved in a digital format click on **“Next”**.

**eRegistration**

Summary

**Customer Registration Request (Reporting Entity)**

Registered Contact Details

Reporting Entity name	Test Trust 1
Address Line 1	Shop St
Address Line 2	Westport
Address Line 3	Co Mayo
Responsible Officer	Joe Bloggs

DAC2-CRS Reporting Obligation Details

Registration Commencement Date	06/04/2020
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**i** The option to generate a Consent letter that can be signed by your client and a copy retained on your records is displayed below. Click on the "Generate Client Consent Letter" button to generate a Consent Letter in respect of the registrations input for your client. The letter will be generated in .PDF format. To view this Letter, you will need at least Adobe Reader version 8.0 or a similar .PDF Reader. The latest version of Adobe Reader is available for free from the following link: [Download Adobe Reader](#).

X Cancel **Generate Client Consent Letter** ← Back **Next** →

Click on **“Browse”** and upload your Client Consent letter. Select the relevant reporting obligations and click **“Next”**. (In this example we have selected DAC2-CRS Reporting Obligation).

**eRegistration**

### Agent Link Attachment

In order to safeguard the integrity and security of Revenue client records, all online requests made by agents which may result in a new agent-client link being created must be accompanied by an uploaded signed Agent Link Notification letter.

Further information and a sample letter are available [here](#).

Electronic copies of signed letters must be in the .pdf, .tif or .tiff format and be less than 5 megabytes in size.

File\*

Please indicate which reporting obligations the attachment is relevant to by checking the boxes.

DAC2-CRS

Please upload a copy of the signed Agent Link Notification letter by clicking the 'Next' button.

- Click on **“Sign & Submit”** on the bottom of the next page.
- On the next page enter your password and click on **“Sign & Submit”**.

You will receive a ROS Acknowledgement with an eRegistration summary which indicates if the registration/linking was successful.

- Once completed, it may take up to 3 working days for the registration to reflect in ROS.
- You will receive a registration confirmation to your ROS Inbox .
- Once the first reporting obligation is added, the Reporting Obligation radio button will appear under **“Complete a Form Online”** on the **“Client Services”** page.

**Employer Services**

<b>Revenue Payroll Notifications (RPNs)</b> <a href="#">Request RPNs</a>	<b>Payroll</b> <a href="#">Submit payroll</a> <a href="#">View payroll</a>	<b>Returns</b> <a href="#">Statement of Account</a>	<b>Additional Services</b> <a href="#">PPS Number Checker</a> <a href="#">PAYE Modernisation Information</a>
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**File a Return**

**Complete a Form Online** ^

Select a return you would like to complete now. You will be given the option of filing the return with or without a payment.

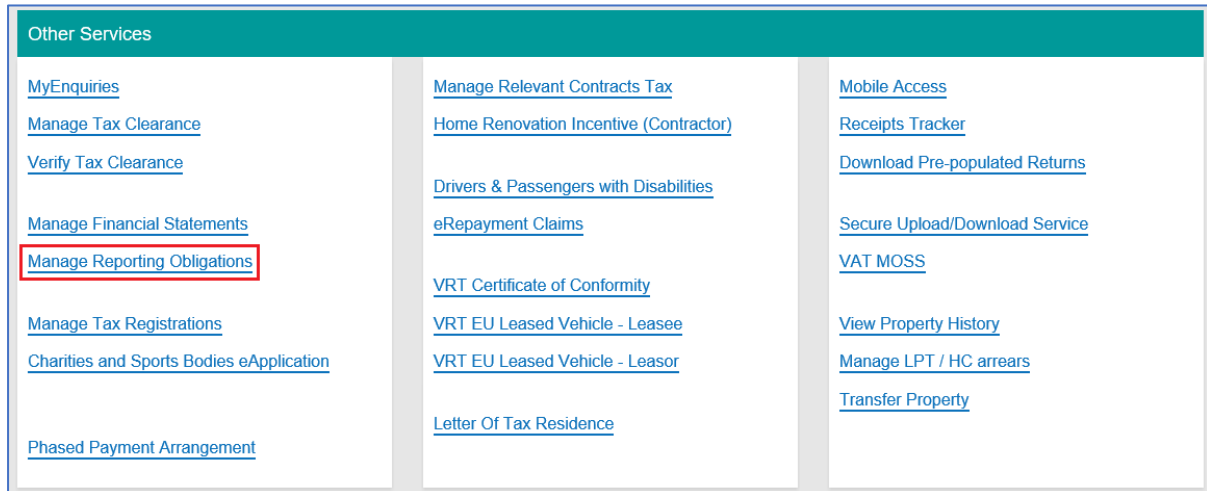
Tax Registrations
  Reporting Obligations

Select a tax type...

**Upload Form(s) Completed Offline** v

## To register an existing client for a Reporting Obligation (where you are already linked to the client):

You can use the method outlined above, or you can also use the “**Manage Reporting Obligations**” link at the bottom of the “Client Services” screen.



You will be brought to the e-Registration page.

Follow the screens as per the above section “**To register a new client for a Reporting**”.